

# Participant Guide

## myAvatar Tips for Data Entry

*Created Exclusively for Milwaukee County BHD*

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## Icon Glossary

The following icons are used in this guide.

Icon	Usage
 <b>Exercise or Discussion</b>	Provides an opportunity for reinforcement.
 <b>Tip</b>	Highlights information that can save you time or make it easier to do something.
 <b>Key Information</b>	Highlights important information that must not be missed by the user.
 <b>Best Practice</b>	Provides a recommendation for a course of action that is either most efficient or will give the user the best results.

# Introduction

This guide is intended to show the myAvatar user interface options designed to reduce clicks while completing data entry and retrieving data.

## Objectives

- Utilize keyboard and interface shortcuts
- Configure your preferences for improved use and efficient queries
- Personalize your Chart View Forms to meet your workflow
- Quickly access forms through Forms & Data Widget
- Gain quick access to caseload clients through MyClients Widget
- Understand benefits to HomeView and ChartView

## Mouse and Keyboard Data Entry Shortcuts

myAvatar has ease of use functionality built into the system. Learning these can reduce mouse clicks, reduce keystrokes, ease navigation and make data entry more efficient.

You can navigate the myAvatar forms using either the keyboard or a mouse.

- Press the Tab key to move from field to field or use the mouse to click each field in a form.
- When you reach the bottom of a form and press the Tab key, the system moves to the next section of the form.
- When you reach the last field of the last section and press the Tab key, the system returns you to the first data entry field of the first form section.
- To quickly scroll to the bottom of a form, use the scroll function of your mouse, or use the arrow keys on your keyboard
- Once you select a data entry element, the way you interact with the field, list, or selection can vary and each have shortcuts.

### Date Fields

Each date field in a form has several shortcuts to meet your data entry preferences. By default, all date fields have a data entry field, with navigation buttons to the right.

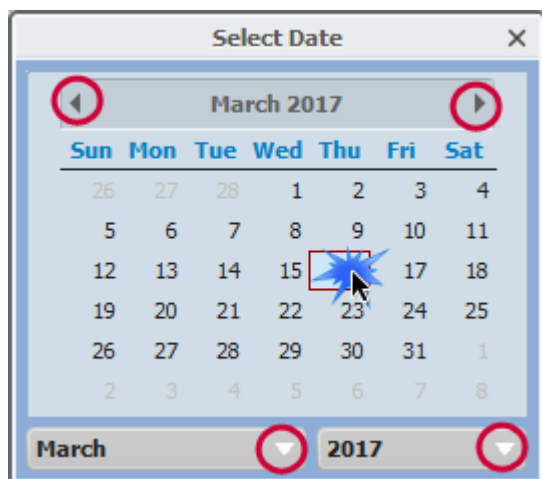
#### *Double-Click a Date Field*

Double-clicking in a date field will display

a calendar.






- Navigate directly to a specific month using the bottom left menu.
- Navigate directly to a specific year using the bottom right menu.
- Navigate forward or back one month at a time using the arrows on either side of the month header.
- Click on a date to select it and return to the form.



### Navigation Shortcuts

To the right of each date field are shortcut buttons.

- Click  for today.
- Click  for yesterday.
- Use the toggles  to move up or back one day at a time.

**Tip:** You can quickly add tomorrow's date using your mouse by clicking T then Up.



### Data Entry Formats

The date fields will automatically format to MM/DD/YYYY, but that does not mean that you must use the long format to enter a date! You can minimize keystrokes using these shortcuts:

- **0501** without hyphens or slashes will auto format to 05/01/2017 based on the **current** year.



**Tip:** Be careful using this shortcut in December and January. For instance, if on December 30, 2017 you enter 0101, the system will default to the *current* year and format as 01/01/2017 when you were likely intending 01/01/2018.



- **050117** without hyphens or slashes will automatically format to 05/01/2017.

- **05012017** without hyphens or slashes will automatically format to 05/01/2017.
- **5-1-17** will automatically format to 05/01/2017.
- **5/1/17** will automatically format to 05/01/2017.

## Date Calculations

Did you know the date field will accept a formula? If you need to enter a future date, you can enter T+x where x equals the number of days in the future. If you need to back date something, you can enter T-x where x equals the number of days in the past.

The “t” can be either upper case or lower case!

-  will auto format to the date 90 days from today
-  will auto format to the date 7 days ago

## Time Fields

Each time field in myAvatar has several shortcuts to meet your data entry preferences. By default, all time fields have a data entry field, with navigation buttons to the right.

### Navigation Shortcuts

To the right of each time field are shortcut buttons

- Click  for current server time.



Key Information: If the form requires the entry to be on the top of the hour, on the half hour, or on the quarter hour such as the case with some myAvatar forms, then Current will error, and you need to enter the time using the keyboard.

- Use the toggles  to move up or down by hours, minutes or AM/PM.

### Data Entry Formats

By default, the time will automatically format to HH:MM AM/PM. But you may be able to shorten the data entry.

#### At the top of the hour

- **0800** without punctuation will automatically format to 08:00 A.M.
- **2000** without punctuation will automatically format to 08:00 P.M.
- **8A** without punctuation will automatically format to 08:00 A.M.
- **8P** without punctuation will automatically format to 08:00 P.M.

#### All other times

If your time is not on the top of the hour, then hours and minutes are required, must be separated by a colon, and include the AM or PM indicator (unless you are using military 24-hour time entry).

- **0823** without punctuation will automatically format to 08:23 AM.
- **2023** without punctuation will automatically format to 08:23 PM.
- **8:23 A** will automatically format to 08:23 AM.
- **8:23 P** will automatically format to 08:23 PM.

## Drop-Down List

There are many drop-down lists available in myAvatar. To navigate the drop-down list, use your mouse to scroll and then click on the line item when it becomes visible. However, keyboard shortcuts are available for lists as well.

Rather than using the scroll bar to navigate a lengthy list, you can type the first letter. For example, the Episode selection list can contain 100 episodes or more. Instead of scrolling through each episode to get to the bottom of the list to select “All Episodes”, click the drop down arrow, press the A key, then the return key. myAvatar scrolls to the bottom of the list



If you select the wrong response, return to the list and either navigate to the correct response, or press the F5 key to remove the selection.



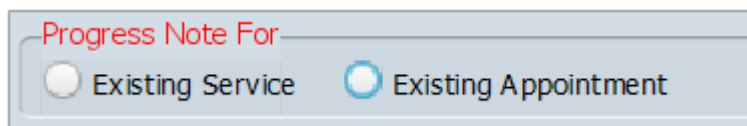


## Radial Buttons

The single select options are designed to allow you to use your mouse to click a single response quickly and move on.

However, if you are using the keyboard to navigate the form, you can press the Tab key to navigate to the section with radial buttons, then use the arrow keys to move from button to button, and use the Spacebar to make the selection and move to the next data entry field on the form.

Here, a blue ring is displayed around the Existing Appointment radial button showing that it is the one slated for selection when you press the Spacebar.

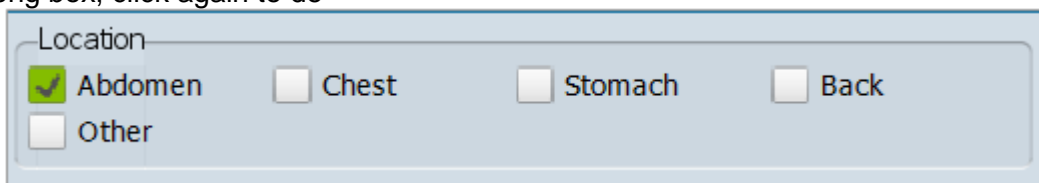


If you select the wrong item, return to the radial button section and either navigate to the correct item, or press the F5 key to clear the selection.



## Check Boxes

Check boxes allow for the selection of multiple options. Simply click in each box to select. If you select the wrong box, click again to de-



select.

## Text Fields

Text fields allow you to free type within a data-entry field.

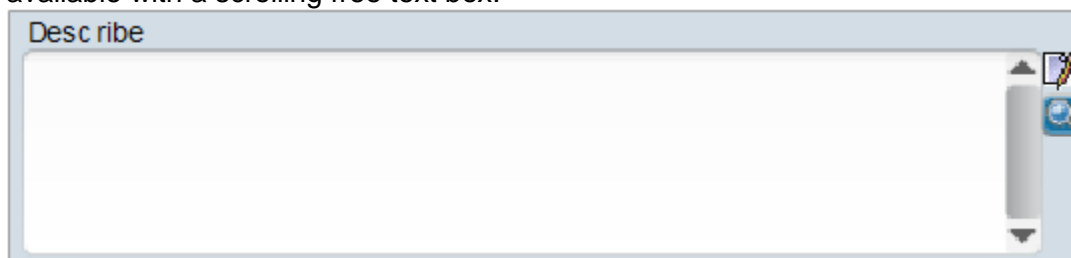
### *Non-Scrolling Free Text*

These types of fields are limited to either 40 or 80 characters and are used to gather short answers. Type your response. If you enter the incorrect data, you may press the Backspace or Delete keys to remove your entry.




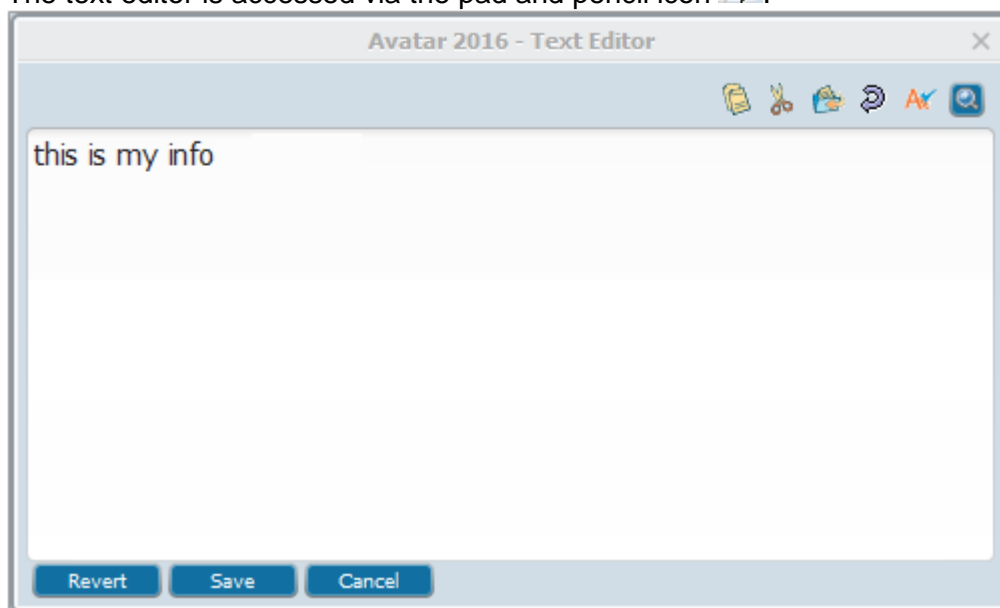
### Scrolling Free Text

These larger text boxes are available for gather larger amounts of text. Several additional options are available with a scrolling free text box.



### Text Editor

The text editor is accessed via the pad and pencil icon .



The text editor allows you to work within a new window with the ability to copy, cut, paste, undo, spell check, and search for specific text.



After you are finished, you have three options:

- Revert – removes changes but keeps the window open so you can continue editing
- Save – saves the changes and returns to the text field
- Cancel – removes changes made in the text editor and returns to the text field




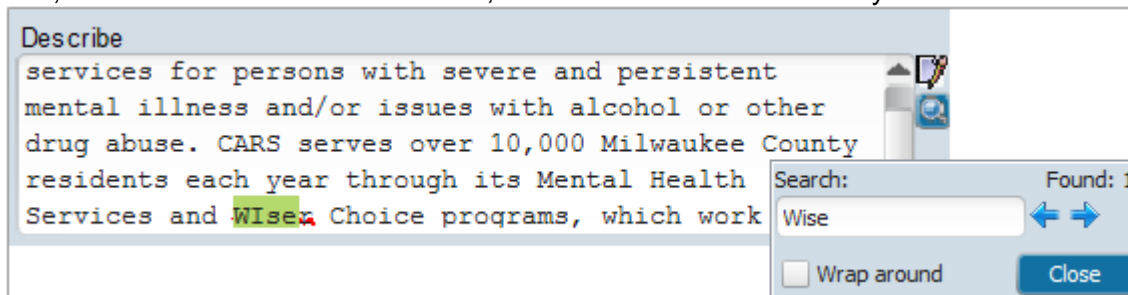
You can also access the same functionality using keyboard shortcuts. Right-click in the text field to see the keyboard commands that work in the text field.

Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Delete
SpellCheck	F7
Select All	Ctrl+A

### Text Search

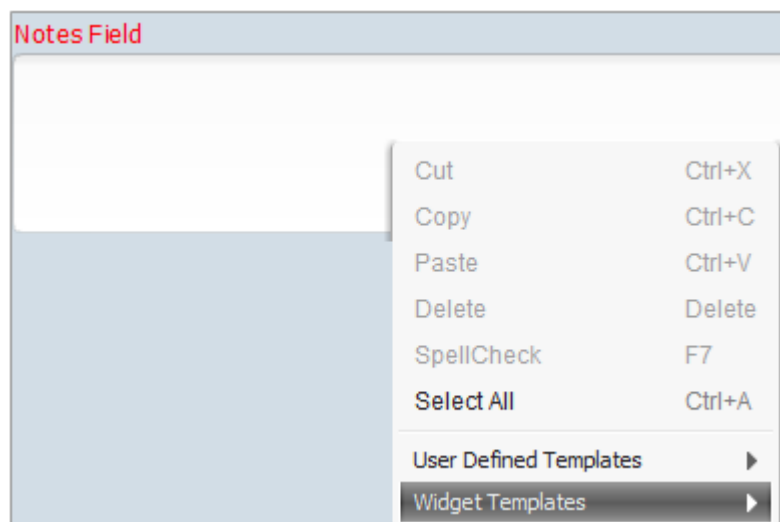
If you want to insert text, you can search for the exact location based on a keyword.

Click the magnifying glass icon  and type a keyword. Click the blue arrows to navigate through your text, when the exact location is found, click the text field and insert your additional comments.



### Templates

Templates allow you to insert pre-defined text that serves to reduce keystrokes and/or provide guidance for inclusion requirements. To access the template, right-click in the text field and then select the template from the menu.



### *Spell Check*

Spell check is available in the scrolling free text field as well as the text editor window. You can also control your spell checking settings in the Preferences of myAvatar.

## Preferences

In the top right-hand corner of your myAvatar screen, a link to preferences is displayed. Utilizing preferences allows you to configure your spell checking options, adjust printer offsets, reload your widget view, and configure the number of items returned in a chart view query to improve performance.

### Spell Checking

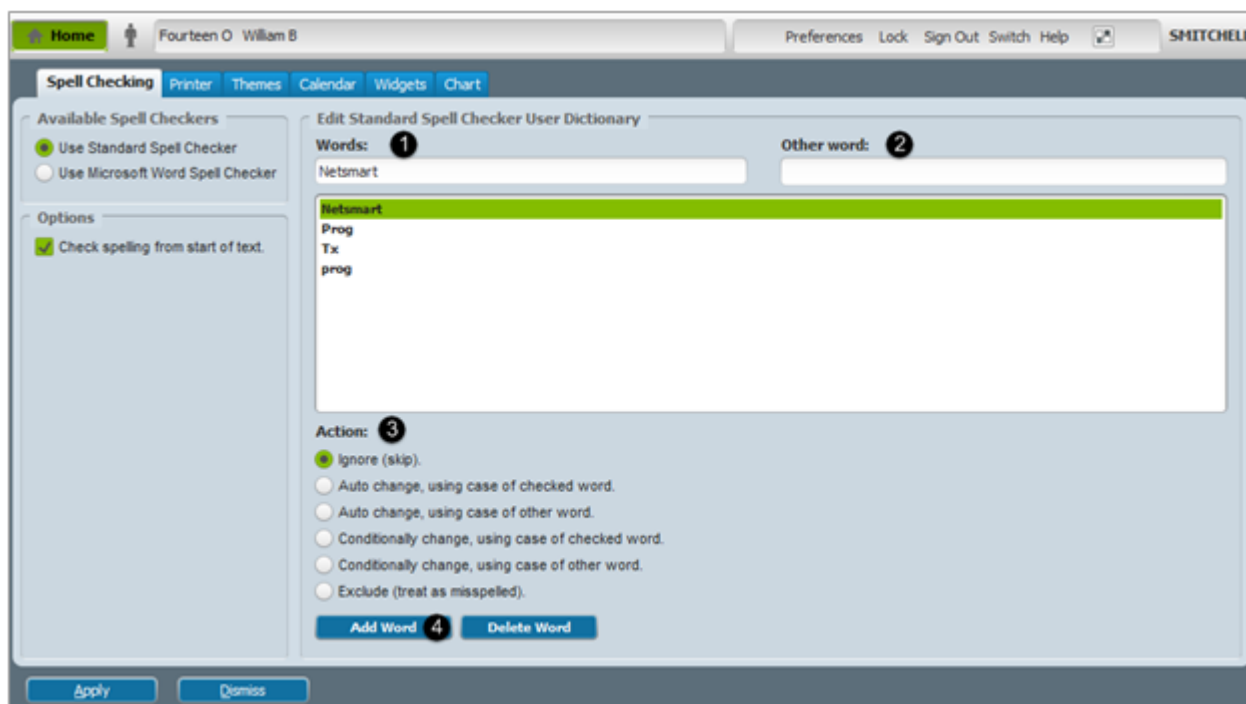
Through the Spell Checking function of myAvatar preferences, you can control which dictionary will be used to verify spelling, and if the standard spell check is selected, you can manually add words to the dictionary for spell check.

With Standard Spell Checker, you can add words that although spelled correctly are often caught by spell check as misspelled. You can also add acronyms you use often and set up spell-check to convert the acronym to the full word at the time spell check is used.

For instance, you type the note: "Ct came to Netsmart for Prog note and Tx plan training," and through spell check it would be changed to "Client came to Netsmart for Progress note and Treatment plan training."

You can configure the dictionary to work this way by:

1. Enter the word or acronym in the Words section.
2. Type the replacement word in the Other word section.
3. Select an Action.
4. Click Add Word.



- Ignore – Use this action to skip words that are spelled correctly, but often caught by Spell Check as misspelled.
- Auto Change, using case of checked word – Use this to automatically change the spelling such as prog changed to progress, or Prog changed to Progress.
- Auto Change, using case of other word – Use this to automatically change the spelling such as Tx changed to treatment.
- Conditionally change, using case of checked word – Similar to auto change criteria, except you can choose the replacement at the time of spell check.
- Conditionally change, using case of other word – Similar to auto change criteria, except you can choose the replacement at the time of spell check.
- Exclude (treat as misspelled) – Use this when you have accidentally added a misspelled word to the dictionary when completing spell check. (Or you could just delete the misspelled word).

## Chart

This controls which episode tabs you see in chart view. When working with an active client and viewing active episodes of care, set the chart preference to **Open**. This allows you to quickly navigate the client's current information while improving the performance of Chart View loading.

You can change these settings as often as desired. So, if you have a new client with historic data that you wish to view, you can change the settings to **All**.

# Chart View

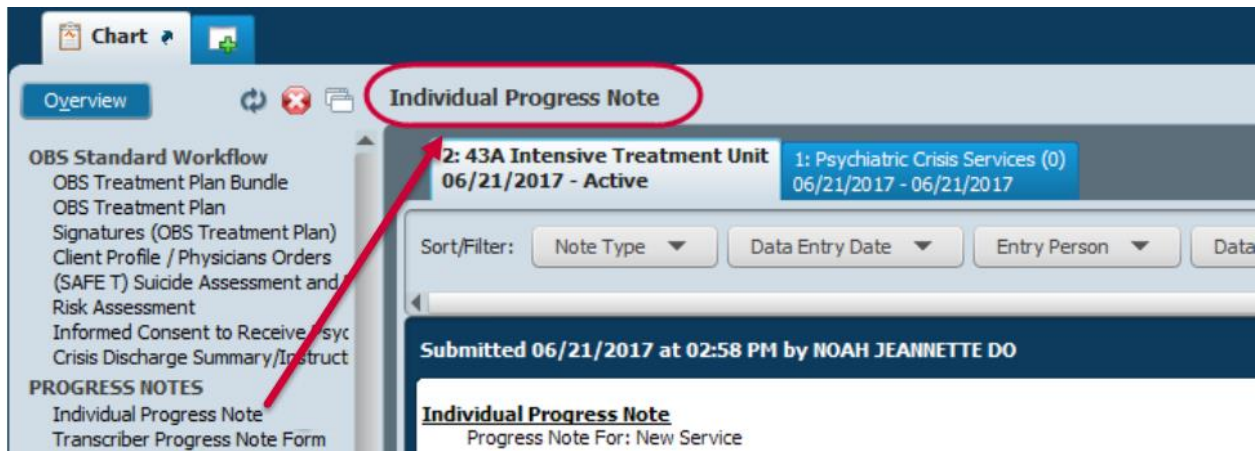
The myAvatar Chart View is designed to give you quick access to review a client's chart. Forms on the left side of the chart view are intended to be used when you need to review what has already been completed for a client prior to adding a new record. If all you intend to do is add a new record without reviewing earlier entries, use the plus sign next to the Chart tab to open the forms search and launch the form. (See Forms & Data widget)

## Widgets & Forms

Widgets such as the Progress Notes Widget will include all progress notes records in the system while a Form link displays only those records that were entered into the system using that form. It can be helpful to filter the notes to just a particular form when you know which form was used to create the note; but if you do not know which form was used then it can be much more time consuming to find what you're looking for because you need to click Transcriber Progress Note and review, then click on Individual Progress Note and review, and so on.



**Key Information:** Clicking on Individual Progress Note from Chart View forms displays only records entered through Individual Progress Note form. Likewise, Transcriber Progress Notes only displays notes entered through the Transcriber Progress Notes form.



**Recommended Practice:** Use the Progress Note widget on either the Home View or the Chart View to ensure you can view notes written in different forms.

## Progress Note Widget (new)

Sort or Filter columns. When "All Episodes" is selected the widget displays up to 150 of the most recent progress notes across episodes. When a specific episode is selected, the widget displays up to 150

notes associated to the episode.

Selected Client: Alvin G Milwalk (008070536) Episode: All Episodes

Progress Notes Test

Episode	Program	Date	Note Type	Clinician	Draft/Final	Note
Episode	Program	Date	car	Clinician	Draft/Fir	Note
24	43A Intensive Treatment Unit	2019-03-27	Care Management	GEOFFRION,EMMA C	Final	ZZZZZZZZZZ ZZZZZZ ZZZZZZ ZZZZZZ ZZZZZZZZ ZZZZZZZZZZ ZZ ZZZZZZZZZZ ZZZZZZ ZZ ZZZZZZ, ZZZZZZZZ ZZZZZZ
24	43A Intensive Treatment Unit	2019-03-25	Care Management	GEOFFRION,EMMA C	Final	ZZZZZZZZZZ ZZZZZZ ZZZZZZ ZZZZZZ ZZZZZZZZZZ ZZZZZZZZZZ ZZ ZZZZZZ, ZZZZZZZZ ZZZZZZ
23	Psychiatric Crisis Services	2019-03-22	Care Management	RAGON,HANNAH A	Final	ZZZZZZZZ/ZZZZZZZZZZ: ZZZZZZ Z-99 ZZZZZZ ZZZZZZ ZZ: 9999999999 ZZZZZZZZ ZZ ZZZZZZZZ ZZZZZZ ZZ ZZZZZZZZ ZZ ZZZZZZ ZZZZZZ ZZ Z-99, ZZZ ZZ ZZ ZZZZZZZZ ZZ ZZZZZZZZZZ ZZ ZZZZZZZZZZZ
21	Psychiatric Crisis Services	2019-02-20	Care Management	RAGON,HANNAH A	Final	ZZZZZZZZ/ZZZZZZZZZZ: ZZZZZZ Z-99 ZZZZZZ ZZZZZZ ZZ: 9999999999 ZZZZZZZZ ZZ ZZZZZZZZ ZZZZZZ ZZ ZZZZZZZZ ZZ ZZZZZZ ZZZZZZ ZZ Z-99, ZZZ ZZ ZZ ZZZZZZZZ ZZ ZZZZZZZZZZ ZZ ZZZZZZZZZZZ
19	Psychiatric Crisis Services	2018-11-26	Care Management	LAROCCA,LAURA V	Final	ZZZZZZZZ/ZZZZZZZZZZ 9999 Z99 ZZZZZZ ZZ# 9999999999 ZZZZZZZZ ZZ ZZZZZZZZ ZZZZZZ ZZ ZZZ ZZZZZZZZ ZZZZZZ ZZZZZZZZZZ ZZZ ZZZZZZZZZZZ 9999 ZZZ ZZ ZZZZZZZZ ZZZZ ZZZZZZZZZZ

## Progress Note Widget

1. This widget displays all progress notes in the system for the open client based on the time span and filters selected. Unlike the chart view forms, the widget will include all progress notes regardless of the form used to enter the progress note in the system. Enter the number of days back that you want to view notes.
2. Select a specific note type if you want to limit the notes returned to a specific category.

**System Action:** The widget will refresh after each selection.

Progress Notes

Previous 30 **1** days

Selection: All Notes **2**

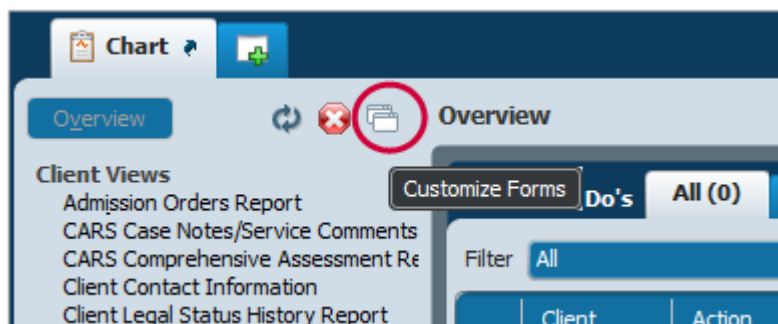
Individual All Notes



Progress My Notes

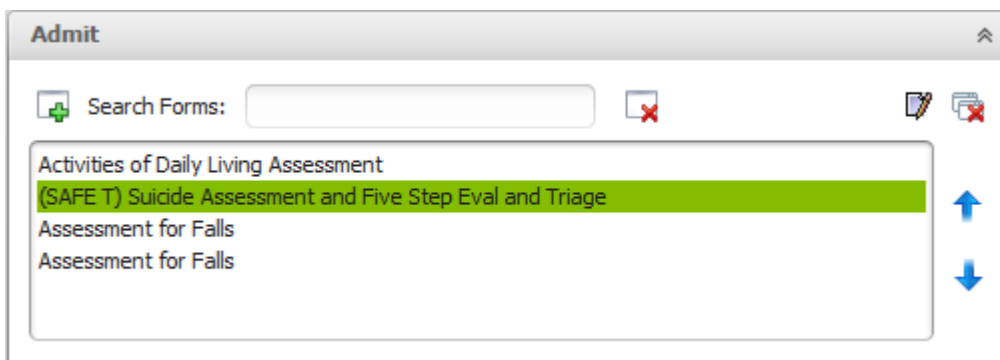
## Organizing Chart View Forms

For chart viewing, the forms you see are associated to your user profile. However, these are not an exhaustive list. You may have permission to other forms even if they do not display in this list. If your job


duties require forms not in the predefined list, you can add additional folders to organize your chart view forms. To do so, click on the customize forms icon.



1. Click the Add Group icon  in the top right of the work screen.
3. Give your group a name. You can organize your forms by task or event. In this example, I'm organizing by event and creating workflows for Admission and Discharge. The wonderful thing about this tool is that you can organize it to the way your work style within myAvatar
4. Click the Add Form icon  in the top left corner of your new group.
5. System Action: A search window will be activated.
6. Type the name of your form and select it from the list by double-clicking the form.
7. Repeat the steps as necessary until you have all your organization groups created and the correct forms associated with the groups.
8. If you add the forms in the incorrect order and want to reorganize the forms within a group.
9. Click the form name to highlight.
10. Use the blue Up and Down arrows at the right to shift the form up or down in the sequence.



If you accidentally add a form twice:

1. Click to highlight the form.
2. Click the Remove form icon 

Once you are satisfied with the groups and forms, click Submit on the bottom left.





**Tip:** You can change your forms as often as necessary to fine tune the workflow to the way your work.

## Forms & Data Widget

The Forms & Data widget is an extremely useful tool offering four ways to access forms:

1. You can browse the menus to search for a form.
2. You can search for a form by key phrase.

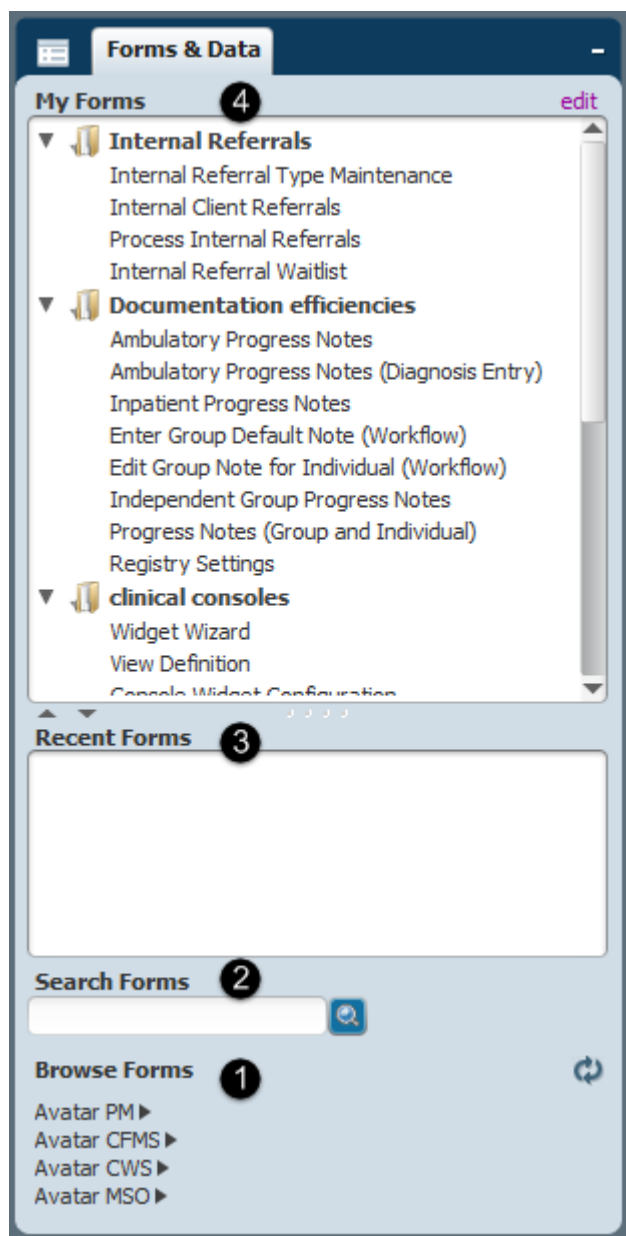


**Tip:** When searching for a form, my Avatar looks for all characters in the exact sequence. If you are unsure of the full name of the form, you will have better results typing a key word. For instance, if I am looking for the form **Client/Caregiver Education** and I type “client caregiver,” the form will not be found due to it not being an exact character match. However, if I type “caregiver,” the system will return two results from which I can select the form I want.

1. You can quickly access forms you’ve already accessed in your current myAvatar session.
2. You can single click on any of the forms added to your favorites.

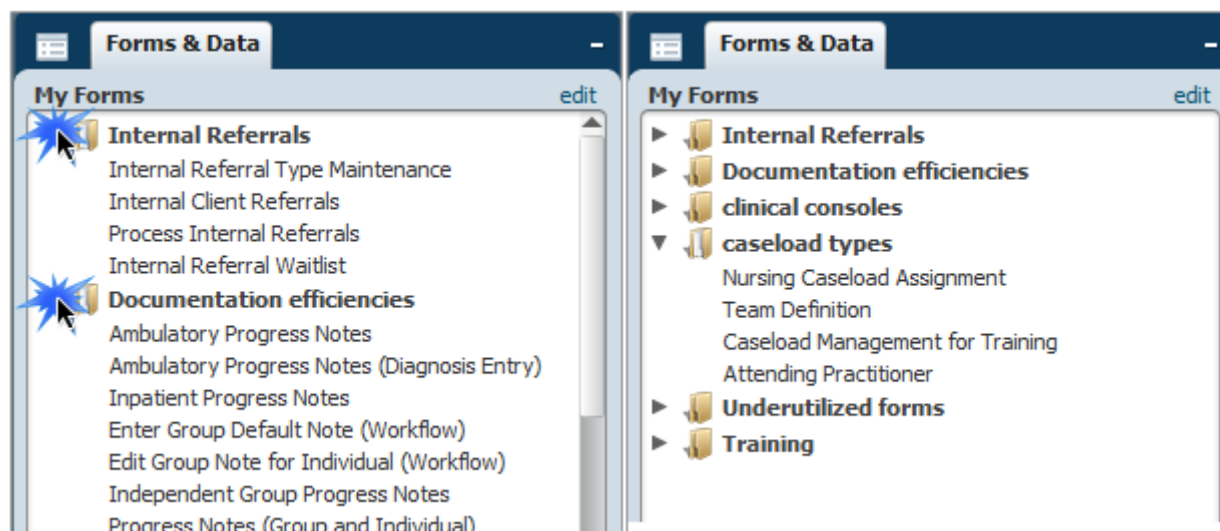


**Tip:** The forms you add as favorites will be available from Chart View when you click the plus sign next to the Chart tab.



## My Forms

The My Forms section of the widget allows folders for organization. Click the arrow to the left of the folder to minimize or maximize the widget. This will allow you to quickly find the form by category.



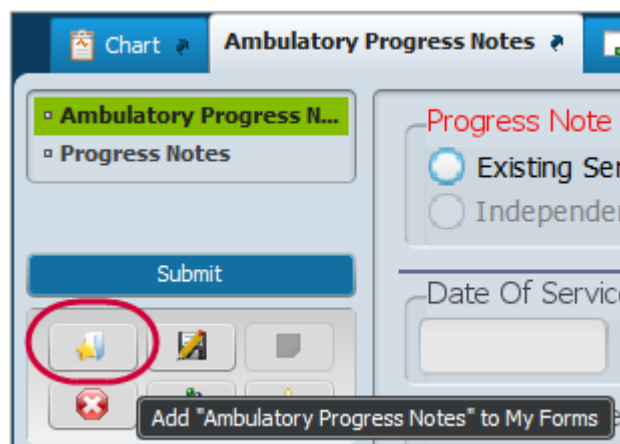
### To Add a Folder to My Forms:

1. Click Edit in the upper right-hand corner of the **Forms & Data** widget.
2. Right-click in the resulting pop-up window.
3. Select **Add Folder**.
4. Enter the name of the new folder.

### To Add to My Forms From the Forms & Data Widget:

1. Click Edit in the upper right-hand corner of the **Forms & Data** widget.
2. Click on the folder where the form will live. Note that if you do not select a folder, your form will live outside a folder.
3. Type the name of the form or part of the name in the lookup field in the top left-hand corner of the resulting pop-up window.
4. Double-click on the form in the list.
5. Click **Add Form**.
6. Click **Save**.
7. Click the refresh button in the lower right-hand corner of the Forms & Data widget to view edits made to My Forms.

In addition to using the edit function of my Forms, you can also add forms to your favorites by clicking on the favorites form icon in any myAvatar form. If you wish to organize the forms later into folders, you can do so by following the steps above for creating folders and then click and drag the forms to the respective folders.



# Client & Staff Widget

This widget gives you quick access to clients, staff, and scheduling sites/units.

## Clients

The Client tab of the widgets provides three way to access clients:

1. Search for a client.

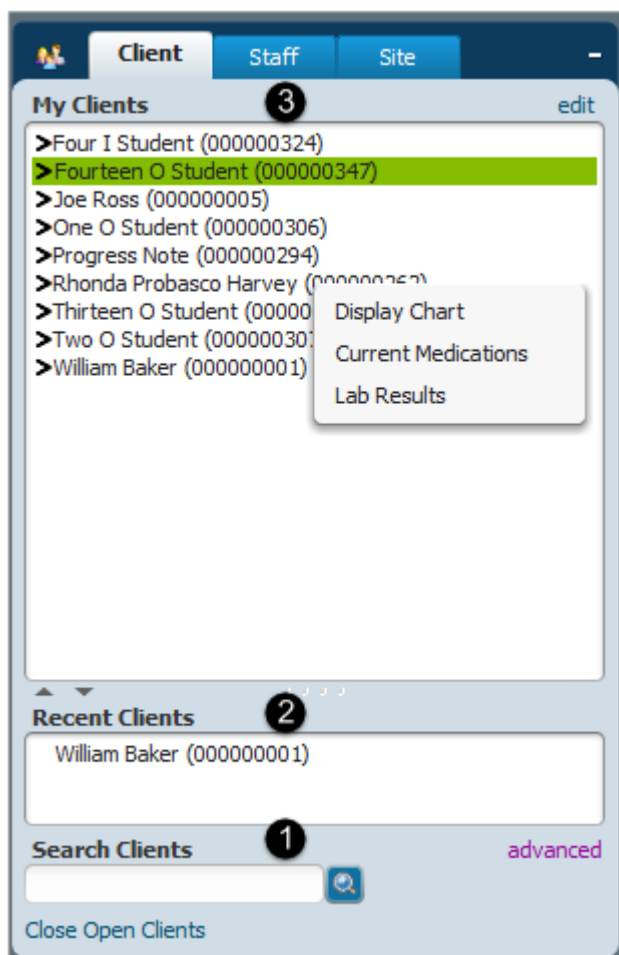


**Tip:** Click advanced to include search criteria such as SS#, DOB (Date of Birth), Gender, Assigned ID, and Facility Chart Number.

The screenshot shows a 'Select Client' window with the following elements:

- Search fields: Last Name, First Name, Sex (dropdown), Social Security #, Date of Birth, Assigned ID, Facility Chart Number.
- Buttons: Search, Clear, View Client Picture.
- Table with columns: S..., Name, ID, Client Race, Date Of Birth, Sex.
- Buttons: Select, Cancel.

2. Access recent clients.
  3. Access clients on your caseload from your MyClients widget.
- Right-click on any client name to view a sub menu to open the client's chart, view current medications, or view lab results.
  - Double-click on any client name opens the chart view.

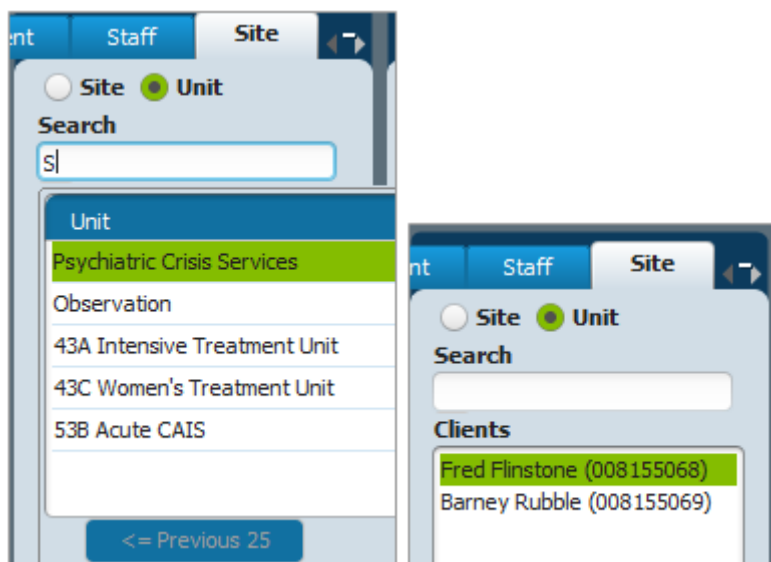


## Staff

Like clients, you can use the staff to navigate to forms to quickly access a staff member and update licenses or demographics.

## Site

You can quickly see all clients associated to a scheduling site or unit. Change the search criteria to Unit, type a part of the unit name, and select the unit.



The unit stays selected until you log off or until you search for a different unit.

## HomeView

The myAvatar HomeView is designed to allow quick access to your clients and data. By selecting a client, the widgets present only data about that client, and if desired, you can select a single or all episodes of care for which you wish to see data. Most widgets have links or command button to open the forms for the active client and episode selection creating a more efficient use of myAvatar.

### Verifying Client ID and Episode Number

Three sections are displayed at the top of the header.

1. My Views – allows you to change the view to see additional widgets that are grouped together by views.
2. Selected Client – allows you to verify which client you have open. All client based widgets will be displaying information on this selected client.
3. Episode – this is a drop-down menu that allows you to select one or all episodes of care. Once selected, all client widgets are filtered by the episode selection.



# Additional Resources

BHD has a number of tip sheets.

<https://county.milwaukee.gov/EN/DHHS/Provider-Portal/BHD-Training>

